



Financial Literacy throughout the Life Cycle

A Mini-Conference of the 2005 White House Conference on Aging
July 14, 2005 | 101 Constitution Avenue, NW | Washington, DC

Agenda

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| I. Registration and Continental Breakfast | (8:00 – 9:00 AM) |
| II. Welcome and Introductions, Dallas L. Salisbury | (9:00 – 9:11 AM) |
| III. Mini-Conference Speaker, Jean Chatzky | (9:10 – 9:40 AM) |
| IV. Moderator's Instructions | (9:40 – 9:50 AM) |
| V. Break | (9:50 – 10:00 AM) |
| VI. Breakout Groups | (10:00 AM – 12:30 PM) |
- Attendees will explore two areas of concern. Within each area of concern, participants will define the central issue within this topic, identify any barriers that exist to achieving progress, and determine the top solutions to overcome any of these obstacles.
- Areas of Concern:**
- A. Building a Financially Smart Society**
What Can Be Done to Help Americans Plan and Save Properly Throughout Life?
 - B. Building a Financially Secure Society**
What Can Be Done to Help Americans Optimally Manage their Assets to Last throughout Life?
 - C. Building a Financially Safe Society**
What Can Be Done to Help Americans Avoid Financial Fraud and Exploitation as They Age?
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| VII. Buffet Lunch | (12:30 – 1:30 PM) |
| VIII. Breakout Groups Continue with New Participants | (1:30 – 3:30 PM) |
| IX. Break | (3:30 – 3:45 AM) |
| X. Group Facilitators Report on Breakout Group Findings | (3:45 – 4:45 PM) |
| XI. Moderator's Closing Remarks and Adjournment | (4:45 – 5:00 PM) |

